

Product: CGIVIT	DAUDIIIIng
<b>Version:</b> 4.0.20	
Release Date: Decen	nber 2014
Customer Support: Conta	ct the Help Desk at (800) 359-0911 option 5 with any questions.

### Introduction

This document contains information regarding the current DAQbilling release.

### **New Contracted Services**

**DAQReminders:** DAQReminders is a contracted service that contacts a patient prior to an appointment by phone, email, or text message.

Customers may use this feature to automate the necessary yet time consuming task of reminding patients about upcoming appointments. DAQReminders is more effective and efficient than traditional manual methods. This service can reduce no shows at your practice and free up your busy staff at the same time.

A Contact Preferences field now resides on the Patient Demographic screen. Up to two (2) contact preferences may be chosen. The contact preferences include any phone number or email address present in the patient's demographics. A "Do not use DAQReminders to contact" option is also available. This option disables DAQReminders for a specific patient.

0077	Last	Bond	First James	Middle	Suff	fix Inactive		
<u>General</u> <u>Ins</u>	urance <u>N</u> otes <u>O</u> t	her Appointment	s					
Birth	Ŧ			Signature Date	<b>*</b>			
Gender	N/A 🔹 SS	N		Default Location	240 East 68th Street (	1) 🔹	1	
Address 1				Default Provider				
Address 2				Default Ref Provider				
City, St ZIP			•	Marital Status	Single	Race 🔹	]	
Home Phone	(444)555-6666	Cell Phone	(222)888-6666	License No.	И	Med. Rec. No.		
Work Phone		Ext		Death	+			
Email	Bond@email.com				No Statement			
Con	tact Preferences (Ph	one/e-mail)			Do not use DAORer	ninder to contact		
1-	CELL		· 🔻					

The Contact Preferences option is also available from the Appointment screen.

Туре	FOLLOW UP    Created 11	/11/2014 - BIL Modified 11/11/2014 - BIL
Start	11/11/2014 - 08:45 AM - Duration 3	Minutes 🔲 All Day Event
	Contact Preferences (Phone/e-mail) 1- OFFICE  2- CELL-TEXT	Do not use DAQReminder to contact



**Note:** Changing the Contact Preferences on the Appointment screen will change the Contact Preferences in the Patient Demographics.

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DAQbilling v4.0.20 Release Notes

The patient has the ability to respond to the reminder. The response to the DAQReminder displays as the status. The status is visible from the Open Appointment, Scheduler, and DAQReminder Review Report screens.

ype	FOLLOW UP   Crea	ted 11/11/	/2014 🔫 BIL	Modified 11/11	L/2014 🔻 BIL
Start	11/11/2014 👻 08:45 AM 🚔 👻 Dura	ation 30	Minutes [	All Day Event	
	Contact Preferences (Phone/e-mail) 1- OFFICE	EXT	•	Do not use DAQRer	ninder to contact



The DAQReminder Review Report screen has been added to the Patient Management section. This screen displays patients that have received or will receive a DAQReminder, as well as their status.

						Appointment Date :	10/29/2013	▼ 11/	11/2014	•	?
Patient No	Patient Name	Appt Date	Status	Date Received	Date Send	Dr. Name	Location	Appt. Reas	on	Insurance	
007	bond P james	9/16/2014 8:45:00 AM			9/11/2014 4:46:01 PM	james SMITH	Mount Sinai Medi	FOLLOW UF	2	ICFA Print	:
007	bond P james	10/4/2014 8:15:00 AM		Oct 2 2014 10:16AM	10/3/2014 11:13:38 AM	james SMITH	Mount Sinai Medi	ALLERGY IN	JECTION I	HCFA Print	ŧ.
007	bond P james	10/6/2014 8:00:00 AM		Oct 2 2014 10:16AM	10/3/2014 11:13:37 AM	james SMITH	Mount Sinai Medi	ECHOCARD	IOGRAM,	HCFA Print	:
003	MARGE J.B. O'SIN	10/6/2014 8:45:00 AM		Oct 2 2014 10:16AM	10/3/2014 11:13:31 AM	james SMITH	Mount Sinai Medi	HOME VISIT	r i	it Works B	ut Rare
5037	BEGONA a	10/6/2014 10:00:00 AM		Oct 2 2014 10:16AM	10/3/2014 11:13:33 AM	james SMITH	Antek Family Pra	FOLLOW UF	>		
009	Bill Bond	10/7/2014 8:30:00 AM		Oct 2 2014 10:16AM	10/3/2014 11:13:35 AM	james SMITH	Antek Family Pra	ALLERGY IN	JECTION	AARP	
007	bond P james	10/7/2014 9:15:00 AM	Email Sent, Cancel Req	Oct 2 2014 10:16AM	10/3/2014 12:30:42 PM	james SMITH	Mount Sinai Medi	ECHOCARD	IOGRAM I	HCFA Print	:
007	bond P james	10/10/2014	Answered By Machine	Oct 7 2014 4:08PM	10/8/2014 11:58:20 AM	james SMITH	Mount Sinai Medi	ECHOCARD	IOGRAM	HCFA Print	:
003	MARGE J.B. O'SIN	10/10/2014 1:00:00 AM	Answered By Machine	Oct 7 2014 4:08PM	10/8/2014 1:10:43 PM	james SMITH	Mount Sinai Medi	FOLLOW UP	>	t Works B	ut Rare
🙎 Edit Pa	tient 🕢 Refrest	1									ОК

# DAQReminder icons and descriptions:

Icon	Description
Answered By Person	The phone call was answered by a person.
Answered By Machine	The phone call was answered by an answering machine.
🔅 No Answer	The phone call was not answered.

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lcon	Description				
🖙 Busy	The phone line was busy.				
Se Disconnect	The phone call was disconnected.				
Confirm	The patient confirmed the appointment.				
× Cancelled	The patient cancelled the appointment.				
Reschedule	The patient requested to reschedule the appointment.				
SMS Confirmed	The patient confirmed the appointment by text message.				
× SMS Cancelled	The patient cancelled the appointment by text message.				
3. SMS View Report	The patient responded with more information than just to confirm or cancel the appointment.				
SMS Sent	A text message was sent to the patient.				
SMS Not Sent	A text message was not sent to the patient.				
গ্ব Email Sent	An email was sent to the patient.				
Email Not Sent	An email was not sent to the patient.				
× Email Sent, Cancel Requested	The patient cancelled the appointment by email.				
◆ Email Sent,Reschedule Requested	The patient requested to reschedule the appointment by email.				
" EMail Sent, Appt. Confirmed	The patient confirmed the appointment by email.				
Bad Email Address	The patient's email address was invalid.				

# New Features and Enhancements for Existing Contracted Services

**Insurance Eligibility Verification (IEV):** In this release, improvements were made to automated IEV functionality, as well as several usability enhancements. It is now easier to review and navigate verification statuses.

The option to select medical specialties has been added to the IEV tab in the Practice Settings screen. Up to five (5) medical specialties can be selected. When IEV is requested, the messages sent from the insurance company will be reviewed for coverage of the specific specialties chosen.

Main IEV TimelyFile Additional Fields User Defined Fields					
Description	Value				
Automated Medicare IEV requests					
Automated Medicaid IEV requests					
Automated BC/BS IEV requests					
Automated Commercial IEV requests					
Automated Tricare IEV requests					
Medicare IEV requests fewer than this many days apart are considered too fr	equi 30				
Medicaid IEV requests fewer than this many days apart are considered too fre	.quε 30				
BC/BS IEV requests fewer than this many days apart are considered too frequ	ent 30				
Commercial IEV requests fewer than this many days apart are considered too	frec 30				
Tricare IEV requests fewer than this many days apart are considered too freq	uen 30				
Automated Medicare IEV requests will be issued this many days before schedu	led 1				
Automated Medicaid IEV requests will be issued this many days before schedu	ed 1				
Automated BC/BS IEV requests will be issued this many days before scheduled	ap 1				
Automated Commercial IEV requests will be issued this many days before sche	le 1				
Automated Tricare IEV requests will be issued this many days before schedule	da; 1				
IEV Specialty #1	Health Benefit Plan Coverage				
IEV Specialty #2	Surgical				
IEV Specialty #3					
IEV Specialty #4					
IEV Specialty #5					

Based on the specialties chosen, the Status and Failure Reason columns display Verified along with the number of active benefits for the patient.

🔌 Insurance	Insurance Verification										
Verified	Pending	✓ Failed	Not Sent	Date Field	Appointment	11/6/2014	•	11/6/2014 -	•		
Patient No.		Name	Requested	Appointment	Insurance	Status	Ŷ	Failure Reason			
527			10/31/2014	11/6/2014 10:15:00 AM	AETNA	Verified (Active & Of	ther	21 Active benefit(s) four	nd for		
531			10/31/2014	11/6/2014 9:15:00 AM	BLUE CROSS BLUE SH	Verified (Active & O	ther	9 Active benefit(s) found	l for		
531			10/31/2014	11/6/2014 9:45:00 AM	BLUE CROSS BLUE SH	Verified (Active & O	ther	9 Active benefit(s) found	l for		
527			10/31/2014	11/6/2014 9:45:00 AM	AETNA	Verified (Active & O	ther	21 Active benefit(s) four	nd for		
708			11/4/2014	11/6/2014 9:15:00 AM	MEDICARE	Verified					
708			11/4/2014	11/6/2014 9:00:00 AM	MEDICARE	Verified	1				

# **Enhancements for Existing Features**

## **Open Deposits Screen:**

**Filter:** A filter function has been added to the Open Deposit screen. This feature makes it easier to review and navigate payment information. Enter a value into the filtering fields and click the Filter icon to activate. The screen indicates Filter Active and the results are displayed on the screen. Click the Filter icon again to remove the filter.

Open Deposi	ts						
1	Filter Active: Deposit N	No:	Deposit Desc.:			Amount: 550	
	Payment Des	с.:					C-
8	Posted	No	Description	Open Date	Post Date	Amount	Applied
Open New Depo	osit 🕀 🧹	988 Dep	osit 9/10/2014	9/10/2014	9/10/2014	550.00	550.0
8	⊕ × 1	967 Dep	osit 4/8/2013	4/8/2013	4/8/2013	550.00	550.0
Edit Deposit	🗄 🖌	930 Dep	osit 11/11/2009	11/11/2009	11/11/2009	550.00	550.0
Ă		920 Dep	osit 6/23/2008	6/23/2008	6/23/2008	550.00	450.0

**Encounter Level Editing:** An Encounter Level editing function has been added to the Open Deposit screen. Encounter Level Editing allows a payment to be expanded to display all the encounters where the payment is applied. This option is activated from the Main tab in the Practice Settings screen.

This feature is ideal when opening payments with many encounters. This feature speeds up navigation by allowing users to view encounter details within a payment on the Open Deposit screen on an as needed basis.

Practice Settings	
Main IEV TimelyFile Additional Fields User Defined Field	ds
Description	Value
Enforce Onset Date	
Patient Auto Increment	
Do NOT allow manual assignment of Patient Number	
Default Location NPI	
Date to show in Review History FROM column	Payment Date
Line Item Diag Order	
Auto-fill Allowed amount from Expected Reimbursement in Payme	V
Add Encounter level editing to the Open Deposits menu	

Once a payment is expanded, click the desired encounter to display the Patient Payment screen for more details.

Po		sted	No		Desc	cription	Open Date		Post Date	Amount	Applied	ł)
E	1	869 Deposit		4/12/2007		4/12/2007		0/2014	2,637.10	2,8	337.10	
	1	Deposit Type Pay 1		Туре	Pay Description	tion Pay Date		Amount	Withholdings / Additions	Applied 🔺		
6						11/2/2014	0.00		\$0.00 / \$0.00	95.	00	
		Encounte	Encounter ID Case No		Case No		1	Insurance Balance		Patient Balance		^
		18096 007			007				\$0.0	0	\$0.00	ш
				18099	007				\$0.0	0	\$0.00	
				18101	007				\$50.0	0	\$0.00	
		2		18103	007				\$0.0	0	\$0.00	-

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**Unapplied Payment Bucket:** An Unapplied Payment Bucket function has been added to the Open Deposit screen. This feature allows the user to hold a surplus of funds from a patient. Once a patient has a balance, the funds from the Unapplied Payment Bucket can be applied to an encounter from the Patient Payment screen. This feature is useful for managing funds when patients pay in advance (pre-pay) for future visits.

👸 Open Deposits							
Filter A	ctive: Deposi	it No:	Deposit Desc.: unapplied			Amount:	
	Payment D	esc.:					
<b>1</b>	Posted	No 🛆	Description	Open Date	Post Date	Amount	Applied
Open New Deposit	1	1	Unapplied Payment 8/23/2014	8/23/2014	8/23/2014	1,000.00	50.00
8	1	2	Unapplied Payment 8/23/2014	8/23/2014	8/23/2014	1,000.00	0.00
Edit Deposit	1	3	Unapplied Payment 8/23/2014	8/23/2014	8/23/2014	395.00	445.00
	1 <b>1</b>	4	Unapplied Payment Bucket 9/2/2014	9/2/2014	9/2/2014	1,000.00	200.00
Close Deposit	1	5	Unapplied Payment Bucket 9/2/2014	9/2/2014	9/2/2014	500.00	500.00
Close Deposit	1	6	Test2 - Unapplied Payment Bucket 9/2/2014	9/2/2014	9/2/2014	500.00	500.00
	1	7	Test1- Unapplied Payment Bucket 9/2/2014	9/2/2014	9/2/2014	0.00	0.00
Re-Open Deposit	1	8	Unapplied Payment Bucket 9/2/2014	9/2/2014	9/2/2014	0.00	0.00
	1	9	Unapplied Payment Bucket 9/2/2014	9/2/2014	9/2/2014	0.00	0.00
	1	11	Unapplied Payment Bucket 9/2/2014	9/2/2014	9/2/2014	250.00	250.00
Open New Onapplied Pa	1	12	Unapplied Payment Bucket 9/3/2014	9/3/2014	9/3/2014	1,000.00	0.00
3	1	13	Unapplied Payment Bucket 9/3/2014	9/3/2014	9/3/2014	300.00	0.00
Edit Unapplied Pymnt	1	14	Unapplied Payment Bucket 9/3/2014	9/3/2014	9/3/2014	250.00	0.00
	1	15	Unapplied Payment Bucket 9/4/2014	9/4/2014	9/4/2014	1,500.00	500.00
Close Unapplied Pympt	1	16	Unapplied Payment Bucket 9/4/2014	9/4/2014	9/4/2014	0.00	0.00
	1	17	007 - bond Unapplied Payment Bucket 10/30/20	10/30/2014	10/30/2014	300.00	0.00
	1	18	James BOnd Unapplied Payment Bucket 11/4/20	11/4/2014	11/4/2014	900.00	500.00
Re-Open Unapplied P.	1	19	Unapplied Payment Bucket 11/4/2014	11/4/2014	11/4/2014	0.00	0.00



Note: The Unapplied Payment Bucket can only be used for patient payments.

Click **Open New Unapplied Payment** to create an Unapplied Payment Bucket. The details of the payment can be entered into the Unapplied Payment Bucket. This feature keeps track of the amount that has been applied and the remaining balance.

Description	James Bond U	napplied P	ayment B	ucket <mark>11/4/</mark> 20	14	
Open Date	11/4/2014	▼ P	ost Date	11/4/2014	•	
Amount	900.00	Applied	500.00	Balan	ice 400	00
Status			CAS	н <b>–</b>		

From the Patient Payment screen, an unapplied payment can be selected from which to transfer funds. Once an Unapplied Payment Bucket is selected, the amount that is to be used from the unapplied payment can be entered into the Unapplied Amount. The payment can then be applied to a patient's encounters as needed.

😴 Patient Pay	ment [102459]	-	-					
Payment Type	PAT - Check	-	Dep No	862	Deposit 4/4/2007		Payment Date 11/12/2014	- 💽
		Unapplied Pay	/ment No	18	James BOnd Unap	plied Payment Bucket 11/4/2	014 Remaining Balance 400.00	
Payee/Check I	ng House Report				Check Amount	Unapplied Amount	Gross Payment	100.00
					0.00	100.00	Applied	0.00
Encounter	· ID or	Patient No		or Gu	uarantor ID	<b>%</b> Fetch	Unapplied	100.00
							Prompt Before Delete	

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An Unapplied Payment Bucket Slip report has been added to the Open Deposit screen. When an Unapplied Payment Bucket Deposit is selected, this report is generated and displays all the encounters where the unapplied payment is applied.

4	Deposit Slip
Reports	Unapplied Payment Bucket Slip
Show Closed Deposit	Patient Receipt/EOB

**Clearinghouse Reports:** The ability to access the Clearinghouse Reports has been added to the Patient Payment screen.

Payment Type PAT - Check Dep No	974 Deposit 1/21/2014	Payment Date 11/6/2014	- 😨
Unapplied Payment No		Remaining Balance	
Clearing House Report			
Payee/Check Number/Description	Check Amount Unapplied Amount	Gross Payment	0.00
	0.00	Applied	0.00
Encounter ID or Patient No	or Guarantor ID	Unapplied	0.00
N/			

# Patient Lookup (multiple screens):

**Patient Lookup by Location:** The option to search by default location has been added to the Patient Lookup screen. A new column has also been added that displays the default location of the patient.

Encou	unter #	_	Last, First				SSN		Birth		
0											
Policy	Number					Location ALL			•		5 Fetch
Alert	No.		Last	Δ	0.8	First	Middle	Suffix	Birth Date	LOCATION	
	2	a			a				1/1/1950	Antek Family Practice	
	3	a			a				1/1/1950	Antek Family Practice	
	500026	a			a				1/1/1950	Antek Family Practice	
	50015	a			a				1/1/1950	Antek Family Practice	
	50016	a			a				1/1/1950	Antek Family Practice	
	50017	a			a				1/1/1950	Antek Family Practice	

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## **Encounter Screen:**

**Diagnosis Code Pointers:** The Diagnosis Code Pointers field has been changed to four columns allowing the diagnosis code pointers to be entered on the Encounter screen. This feature allows for faster editing of Dx code pointers by allowing users to navigate through the Tab button and edit the encounter.

Z Encounter [007] bond P james Birth: 8/28/1980 Age: 34 years	
No. 007 Encounter 19151 Claim Date 11/12/2014	Date of Service 11/12/2014 -
THIS IS A PATIE	IT ALERT
Provider 1 Ward F Doom M.D.	Location Mount Sinai Hospital (2)
Primary AARP (18)	▼ ICD Type ICD9 ▼
Secondary	Diag Codes 001 2
Tertiary	
🖳 Review 👿 Bill Electronic 🖳 Do Not Split Encounter 👷 Default Accept Assignment 🔹	Primary Onset Date 5 6 7 8
Expected Copay = \$18.10	9 10 11 12
Claim Information Additional Information Billing Information	
Description Proc Addl From To M1 M2 M3 M	4 DX1 DX2 DX3 DX4 POS TOS Units Pat Resp Charge 🔺
1 ANESTH, SALIVARY GLA 00100 11/12/2014 11/12/2014 2	1 11 1 1 0.00 100.00

### **Insurance Setup Screen:**

**Routing ID Lookup:** The ability to view the Payer ID has been added to the Routing ID Lookup and the Insurance Setup screen.

Routing ID     Description     Payer ID       150002     NY MEDICAID     NYMCD       70010106     MESA MENTAL HEALTH     85035       2006     NHIC MEDICARE HCFA     75275       3000103     NHIC     75275       2022     AMERIHEALTH     56743       700211     Medical Claims Service     4258       705170     QUINCY HLTHCARE MGMT., INC.     37129			•s Feta
150002     NY MEDICAID     NYMCD       70010106     MESA MENTAL HEALTH     85035       2006     NHIC MEDICARE HCFA     75275       3000103     NHIC     75275       2022     AMERIHEALTH     56743       700211     Medical Claims Service     4258       705170     QUINCY HLTHCARE MGMT., INC.     37129	Routing ID	Description	Payer ID 🛛
70010106       MESA MENTAL HEALTH       85035         2006       NHIC MEDICARE HCFA       75275         300103       NHIC       75275         2022       AMERIHEALTH       56743         700211       Medical Claims Service       4258         705170       QUINCY HLTHCARE MGMT., INC.       37129         Insurance Company [1]       Cigna Health Care       Inactive	1500	2 NY MEDICAID	NYMCD
2006       NHIC MEDICARE HCFA       75275         3000103       NHIC       75275         2022       AMERIHEALTH       56743         700211       Medical Claims Service       4258         705170       QUINCY HLTHCARE MGMT., INC.       37129         Insurance Company [1]       Cigna Health Care       Inactive	700101	06 MESA MENTAL HEALTH	85035
3000103     NHIC     75275       2022     AMERIHEALTH     56743       700211     Medical Claims Service     4258       705170     QUINCY HLTHCARE MGMT., INC.     37129	20	06 NHIC MEDICARE HCFA	75275
2022     AMERIHEALTH     56743       700211     Medical Claims Service     4258       705170     QUINCY HLTHCARE MGMT., INC.     37129	30001	3 NHIC	75275
700211 Medical Claims Service     4258       705170 QUINCY HLTHCARE MGMT., INC.     37129       Insurance Company [1] Cigna Health Care     Image: Cigna Health Care       1     Name Cigna Health Care	20	22 AMERIHEALTH	56743
705170 QUINCY HLTHCARE MGMT., INC.     37129       Insurance Company [1] Cigna Health Care     Image: Cigna Health Care       1     Name     Cigna Health Care	7002	11 Medical Claims Service	4258
Insurance Company [1] Cigna Health Care	7051	70 QUINCY HLTHCARE MGMT., INC.	37129
	Insurance Company I	1] Cigna Health Care	